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Message Text

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ACTION EA-14

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FM AMEMBASSY TOKYO
TO SECSTATE WASHDC IMMEDIATE 4864

C O N F I D E N T I A L SECTION 1 OF 2 TOKYO 12581

E.O. 11652: GDS
TAGS: EFIS, US, JA
SUBJECT: JAPANESE FISHING IN NORTH PACIFIC

REF: A. STATE 208829 B. TOKYO 11595

SUMMARY: EMBASSY'S ABILITY TO PROVIDE ESTIMATES REQUESTED
REF A PARA 3 IS LIMITED BY STRICTURE THAT GOJ
NOT BE CONTACTED AND BY DEPARTURE SEPTEMBER 21 OF EMBASSY'S
FISHERIES ATTACHE. EMBASSY UNABLE TO VERIFY COMMERCE ESTIMATES
REF A PARA 2 AS RESULT OF LACK OF PRECISION RE EXACT GEOGRAPHICAL
AREAS ENCOMPASSED BY PROPOSALS. ALSO, JAPANESE FISH CATCH
STATISTICS ARE NOT COLLECTED OR PRESENTED BY AREAS WHICH WOULD
CORRESPOND TO THOSE COVERED BY REF A RECOMMENDATIONS. HOWEVER,
EMBASSY'S BEST ESTIMATE IS THAT COMMERCE RECOMMENDATIONS, IF
CARRIED OUT, WOULD REDUCE LANDED VALUE OF JAPANESE FISH CATCH
BY WELL OVER $200 MILLION WITH SEVERAL TIMES THAT AMOUNT IN
ADDITIONAL IMPACT ON DISTRIBUTION AND PROCESSING
INDUSTRIES. DIRECT IMPACT ON FISHERIES LABOR FORCE WOULD
BE SMALL BUT PROCESSING INDUSTRIES WOULD BE HARD HIT.
CONSUMER FISH PRICES, ALREADY RISING SHARLY, AND JAPANES LIVING
STANDARD WOULD BE AFFECTED MORE BY CUTBACKS IN SUPPLY
OF CHEAP SPECIES-SUCH AS POLLOCK THAN BY SHORTAGES OF
CRAB OR SALMON. FISHING IS IMPORTANT AND POLITICALLY
INFLUENTIAL INDUSTRY IN JAPAN, CONSUMER PRICES OF FISH--
JAPAN'S MAJOR SOURCE OF PROTEIN--POTENTIALLY ARE A MAJOR
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POLITICAL ISSUE, AND PUBLIC CONCERN FOR FISH CON-
SERVATION IS CURRENTLY AT LOW LEVEL. THUS, GOJ COULD

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BE EXPECTED TO RESIST PROPOSALS TENACIOUSLY AND TO
REQUIRE AS CONDITION FOR ADOPTION OF RESTRAINTS THAT
THEY BE APPLIED EQUALLY TO ALL NORTH PACIFIC FISHING
NATIONS. COUNTER-PROPOSALS WOULD PRESUMABLY SEEK TO REDUCE AREAS
AND PERIODS UNDER RESTRAINT AND TO CHANGE BASE YEARS
FOR CATCH CEILING TO JAPANESE ADVANTAGE. PARAS. 1-7
BELOW ARE IN REPLY TO REQUESTS REFTEL A PARA 3: PARAS
8-12 PROVIDE ADDITIONAL INFORMATION AND COMMENTS WHICH
MAY BE OF ASSISTANCE. END SUMMARY.

1. PRECISE BOUNDARIES CONTEMPLATED BY COMMERCE RECOM-
MENDATION FOR EASTERN BERING SEA AND NORTH EASTERN
PACIFIC OCEAN NOT SPECIFIED REF A. IN ANY EVENT
EMBASSY BELIEVES MONITORING OF QUOTA RESTRICTIONS EN-
VISAGED REFTEL A PARAS 1.A.1, 1.A.4, AND 1.B.3 WOULD
REQUIRE CHANGES IN JAPANESE PROCEDURES FOR COLLECTION
FISH-CATCH STATISTICS, CURRENTLY KEPT BY SPECIES AND
LICENSED VESSEL-TYPE BUT NOT BY GEOOGRAPHICAL AREA
IN WHICH CATCHES ARE TAKEN. LICENSED FISHING AREAS
FOR VARIOUS VESSEL-TYPES ARE GENERALLY LARGER THAN
AREAS WHICH APPEAR TO BE ENCOMPASSED REF A. (SEE
PARA. 8 BELOW FOR DETAILED DESCRIPTION OF VESSEL-TYPES
AND THEIR LICENSED AREAS). FOR THIS REAASON WITHOUT
CONSULTING GOJ OR INDUSTRY SOURCES EMBASSY IS UNABLE
FOR MOST VESSEL-TYPES TO IDENTIFY PORTION OF CATCH
ACTUALLY TAKEN IN AREAS DESIGNATED IN REF A. NOR
CAN WE ASSESS ACCURACY OF ESTIMATES REF A PARA 2
OF IMPACT OF PROPOSED CONSERVATION MEASURES. IT AP-
PEARS, HOWEVER, THAT FOR REASONS GIVEN BELOW REF A PROPOSALS
WOULD REDUCE JAPANESE NORTH PACIFIC FISH CATCH, ESTIMATED REF B
AT TWO MILLION MT PER YEAR, BY SEVERAL TIMES THE 45,000
MT FIGURE CITED REFTEL A PARA 2.

2. USING 35 PERCENT FIGURE FROM REF A PARA 2, CATCH
REDUCTION RESULTING FROM RECOMMENDATIONS WOULD TOTAL
700,000 MT OR 7 PERCENT OF JAPAN'S TOTAL ANNUAL CATCH
OF TEN MILLION MT (LANDED VALUE OVER $3 BILLION). DIRECT
DOLLAR IMPACT OF REDUCTION WOULD BE WELL OVER $200
MILLION, WITH SEVERAL TIMES THAT AMOUNT OF IMPACT ON
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PAGE 03 TOKYO 12581 01 OF 02 271130Z

DISTRIBUTION AND PROCESSING INDUSTRIES.

3. LESS THAN TEN PERCENT OF 500,000 JAPANESE DIRECTLY
EMPLOYED IN FISHING INDUSTRY ARE INVOLVED IN HIGH SEAS
FISHING, WHICH IN QUANTITY ACCOUNTS FOR ABOUT 40 PERCENT
OFFTOTAL CATCH. HIGH SEAS FISHING (MOTHER SHIP-TYPE
FLEETS AND INDEPENDENT TRAWLERS) IS DOMINATED BY TEN
LARGE, WELL-CAPITALIZED FIRMS WHICH PROBABLY WOULD
SURVIVE FINANCIALLY AND WOULD NOT LAYOFF WORKERS
ABRUPTLY ALTHOUGH THERE MIGHT BE SOME REDUCTION OVER TIME BY

Declassified/Released US Department of State EO Systematic Review 30 JUN 2005

Declassified/Released US Department of State EO Systematic Review 30 JUN 2005

ATTRITION. "HOKUTENSEN", WHICH FISH BERING SEA
WEST OF 170 DEGREES WEST, ARE OWNED BY SMALL FIRMS AND
IF THEY WERE AFFECTED BY CONSERVATION MEASURES, MANY
BANKRUPTCIES PROBABLY WOULD OCCUR. (SEE PARA 8 E
BELOW.) SEASONAL RECOMMENDATIONS REF A PARA 1A.2
AND 1B.1 MIGHT ENCOURAGE MORE INTENSE FISHING OF OPEN
AREAS. FISH PROCESSING INDUSTRY INCLUDES MANY SMALL
FIRMS WHICH WOULD BE HARD HIT BY SHORTAGES AND BY
CONSUMER RESISTENCE TO INCREASED PRICES, ESPECIALLY OF
TRADITIONALLY CHEAP FISH PRODUCTS SUCH AS KAMABOKO.

4. IN JAPAN'S SIX LARGEST CITIES JUNE 1974 WHOLE-
SALE PRICE OF FRESH AND FROZEN FISH WAS 18 PERCENT
ABOVE JUNE 1973 LEVEL. CONSUMER FISH PRICES THESE
CITIES ROSE 22 PERCENT FROM 1970-72. MORE RECENT
CONSUMER PRICE INFORMATION UNAVAILABLE. LARGE RE-
DUCTION IN SUPPLY OF POLLOCK, PRINCIPAL INGREDIENT IN
CHEAPEST KIND OF "KAMABOKO" FISH SAUSAGE, A STAPLE
IN DIET OF AVERAGE TO LOWER INCOME JAPANESE, WOULD HAVE
LARGEST IMPACT ON CONSUMER PRICES AND LIVING STANDARD.
POLLOCK IS CAUGHT ONLY IN NORTH PACIFIC, AND
SUBSTITUTE FISH FOR MAKING CHEAP KINDS OF KAMABOKO IS
NOT NOW AVAILABLE. HERRING, CRAB, AND SALMON ARE
LUXURY ITEMS AND IMPACT OF SCARCITY IN THESE ITEMS ON
JAPANESE MARKET WOULD PROBABLY BE SUBSTANTIALLY LESS
THAN THAT OF POLLOCK SHORTAGE.

5. AS REF B STATES, JAPANESE BELIEVE THEY ARE
BEARING DISPROPORTIONATE SHARE OF BURDEN
IN NORTH PACIFIC FISH CONSERVATION. RECENT SUCCESSES
OF FISHING INDUSTRY IN BLOCKING OR GETTING LARGE
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PAGE 04 TOKYO 12581 01 OF 02 271130Z

FINANCIAL SETTLEMENTS FROM INDUSTRIAL FIRMS SEEKING
COASTAL FACTORY SITES AND IN EXACERBATING DIFFICULTIES
OF NUCLEAR SHIP MUTSU ATTEST TO ITS POLITICAL IFLUENCE
AND ORGANIZATIONAL SKILL. JAPANESE FISHING INDUSTRY
IS RANKLED THAT ITS OWN CURRENT VOLUNTARY RESTRAINTS
ON POLLOCK FISHERY IN EAST BERING SEA HAVE BEEN NEGATED
BY LARGE INCREASE IN SOVIET AND SOTH KOREAN FISHING
OF THAT SPECIES AND WILL ARGUE THAT ANY FURTHER RESTRAINTS
AT THEIR EXPENSE WILL REDOUND TO BENEFIT OF THESE OTHER
COUNTRIES AND NOT TO CONSERVATION OF FISH SPECIES. GOJ
CONSIDERS INFLATION TO BE NATION'S MAJOR ECONOMIC AND
POLITICAL ISSUE AND IS LIKELY TO RESIST PRESSURES TO
FURTHER REDUCE CATCHES OF CHEAPER SPECIES SUCH AS
POLLOCK, MORE THAN OTHER MEASURES. AS REF B INDI-
CATES, PUBLIC CONSCIOUSNESS OF NEED FOR FISH CONSER-
VATION IS AT LOW LEVEL. INCREASES IN CONSUMER FISH
PRICES COULD BECOME A HIGHLY VOLATILE POLITICAL ISSUE.

Declassified/Released US Department of State EO Systematic Review 30 JUN 2005

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PAGE 01 TOKYO 12581 02 OF 02 271117Z

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ACTION EA-14

INFO OCT-01 ISO-00 EB-11 CIEP-03 COME-00 COA-02 TRSE-00

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C O N F I D E N T I A L SECTION 2 OF 2 TOKYO 12581

6. JAPANESE CAN BE EXPECTED TO STRONGLY RESIST UNI-
LATERAL RESTRICTIONS WHICH THEY BELIEVE WOULD ONLY BENEFIT
OTHER FISHING NATIONS RATHER THAN CONSERVE FISH STOCKS.
THEIR COUNTERPROPOSALS LIKELY TO CONSIST OF SUGGESTED
COMPROMISES IN SEASONAL AND GEOGRAPHIC RESTRICTIONS AND
ARGUMENTS FOR USE OF OTHER BASE YEARS, PERHAPS
VARYING BY SPECIES, MORE ADVANTAGEOUS TO JAPANESE
INTERESTS.

7. DEPARTMENT MAY WISH TO CONSULT RE ABOVE ITEMS WITH
FORMER EMBASSY TOKYO FISHERIES ATTACHE LORRY NAKATSU,
WHO DEPARTED POST SEPTEMBER 21 FOR REASSIGNMENT TO
WASHINGTON. FURTHER DATA AND COMMENTS ARE PROVIDED
BELOW FOR USE IN ANALYSIS REFTEL A RECOMMENDATIONS.

8. UNDER GOJ LICENSING SYSTEM ENTIRE JAPANESE FISHING
FLEET WHICH IS ALLOWED TO OPERATE IN AREAS UNDER
CONSIDERATION REFTEL A CONSISTS OF:

A. TEN MOTHERSHIP-TYPE TRAWL FLEETS LICENSED FOR
ENTIRE BERING SEA:

B. 42 INDEPENDENT TRAWLERS LICENSED FOR ALL NORTH
PACIFIC AND BERING SEA AREAS EAST OF 170 DEGREES EAST
AND NORTH OF 10 DEGREES NORTH;

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Declassified/Released US Department of State EO Systematic Review 30 JUN 2005

C. TWELVE LONGLINE GILLNET VESSELS LICENSED FOR ENTIRE BERING SEA AND GULF OF ALASKA;

D. 154 "HOKUTENSEN" (FORMER S. PACIFIC VESSELS TRANSFERRED NORTH) LICENSED FOR BERING SEA AREA NORTH OF 48 DEGREES NORTH AND BETWEEN 153 DEGREES EAST AND 170 DEGREES WEST (NOTE: CATCHES OF THESE VESSELS WOULD BE EXCLUDED FROM EASTERN BERING SEA IF IT IS DEFINED AS AREA EAST OF 170 DEGREES WEST);

E. TWO MOTHERSHIP-TYPE CRAB FLEETS LICENSED FOR BERING SEA AREA EAST OF 175 DEGREES WEST IN ACCORDANCE WITH 1964 U.S.-JAPAN CRAB FISHING AGREEMENT;

F. TWENTY-ONE SNAIL FISHING VESSELS LICENSED FOR BERING SEA AREA EAST OF 175 DEGREES WEST. (SLAMON FISHING IS LICENSED SEPARATELY FROM ABOVE SYSTEM.) FISH-CATCH STATISTICS ARE RECORDED BY SPECIES AND BY TYPE OF LICENSED BOAT LISTED ABOVE.

9. FOLLOWING STATISTICS, WHICH REPRESENT TOTAL CATCHES BY ALL VESSELS LISTED PARA 8A-E ABOVE, SHOE SOME YEAR-TO-YEAR FLUCTUATION IN AMOUNT OF EACH SPECIES TAKEN (RELATED IN SOME INSTANCES TO LIFE CYCLE OF SPECIES) AND INDICATE THAT IT MAY BE DESIRABLE TO CONSIDER EACH SPECIES SEPARATELY IN SELECTING BASE YEAR RATHER THAN USING 1971 FOR ALL.

SPECIES	CY 73	CY 72	CY 71
	(UNIT:MT)		
POLLOCK	2,298,939	2,421,355	2,209,449
FLOUNDER	234,004	183,486	198,600
COD	61,670	49,713	57,517
HALIBUT	818	214	1,378
HERRING	2,477	6,702	28,086
SABLE	33,905	45,673	28,922
ROCK	84,317	82,635	81,264
SHRIMP	5,516	6,018	6,122
OTHER	69,913	92,506	47,816

TOTAL	2,791,559	2,888,302	2,659,154

Declassified/Released US Department of State EO Systematic Review 30 JUN 2005

Declassified/Released US Department of State EO Systematic Review 30 JUN 2005

CATCHES OF ABOVE SPECIES BY BOAT TYPES PARA 8 ABOVE:

BOAT TYPE	CY 73	CY 72	CY 71
A.	1,085,491	1,256,045	1,249,996
B.	747,191	699,409	572,601
C.	28,190	32,062	31,165
D.	930,687	900,786	805,392
TOTAL	2,791,559	2,888,302	2,659,154
	(1,860,872)	(1,987,516)	(1,853,762)

( )TOTAL CATCH EXCLUDING "D" TYPE BOATS WHICH OPERATE WEST OF 170 DEGREES WEST (SEE PARA 8D ABOVE).

10. CY 1973 CRAB CATCHES (BY VESSELS DESCRIBED PARA 8E ABOVE) KING - 700,000 CRABS; TANNER - 14 MILLION CRABS.

11. AS SHOWN IN STATISTICS PARA 9 ABOVE HERRING CATCH HAS DROPPED DRAMATICALLY SINCE 1971. 15,000 MT LIMIT FOR TRAWL FISHING WOULD E MANY TIMES QUANTITY TAKEN IN 1973. BULK OF JAPAN'S CY 1973 HERRING CATCH TAKEN BY GILLNET HERRING VESSELS IN WESTERN BERING SEA (RESTRICTED TO AREA NORTHEST OF 52 DEGREES NORTH AND 170 DEGREES EAST) UNDER JAPAN-SOVIET AGREEMENT.

12. RE REFTEL A PARA 1A1 EMBASSY UNCERTAIN WHETHER EAST BERING SEA DEFINED AS AREA EAST OF 170 DEGREES EAST OR 170 DEGREES WEST (OR OTHERWISE) AND WHETHER EXPRESSION "OVERALL POLLOCK CATCH" REFERS ONLY TO EASTERN BERING SEA OR TO JAPAN'S TOTAL POLLOCK CATCH. IF JAPAN'S TOTAL POLLOCK CATCH WERE LIMITED TO ONE MILLION MT, THIS MEASURE ALONE WOULD CONSTITUTE A REDUCTION BY OVER 1.25 MILLION MT. CY 1973 POLLOCK CATCH BY VESSEL-TYPES PARA 8 ABOVE WAS: A-924,039 MT, B-547,917 MT, D-826,983 MT.
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Declassified/Released US Department of State EO Systematic Review 30 JUN 2005

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